

**SUMMARY OF THE  
ON-SITE ASSESSMENT COMMITTEE MEETING  
JUNE 7, 2000**

The On-site Assessment Committee of the National Environmental Laboratory Accreditation Conference (NELAC) met by teleconference on Wednesday, June 7, 2000, at 1 p.m. Eastern Daylight Time (EDT). The meeting was led by its chair, Mr. William Ingersoll of the United States Navy. A list of action items resulting from this meeting is given in Attachment A. A list of participants is given in Attachment B. *The purposes of the meeting were to discuss the committee's approach to technical checklists and technical training for NELAC assessors and to discuss the committee's draft position paper on the level of detail required in an on-site assessment.*

**INTRODUCTION**

Mr. Ingersoll informed the committee that he has contacted Dr. Ken Jackson of the New York State Department of Health in regard to chairing a subcommittee to revise the basic assessor training materials. Dr. Jackson is aware that Dr. Margo Hunt of the U.S. Environmental Protection Agency (EPA) has expressed an interest in serving on the subcommittee. Mr. Ingersoll also relayed information from Ms. Lisa Doucet, NELAC Executive Secretary, that it is too late to include language pertaining to Appendix A, the "basic assessor training standard," in proposed changes to the NELAC Standards for NELAC VI. Such language may be included, however, in the revised changes arising from the committee's working session at NELAC VI. Finally, Mr. Ingersoll noted that the committee should soon submit a teleconference schedule extending beyond June 21, 2000 to Ms. Doucet.

**ASSESSOR CHECKLISTS**

The issue of assessor checklists generated moderate committee discussion. A contributor volunteered to provide the committee with practical comments from NELAC assessors in his state after reviewing the Quality Systems checklist. In further discussion, it was noted that the committee had previously suggested querying the NELAC Accrediting Authorities regarding their assessor checklists in order to combine the best elements of those checklists. There was additional discussion of technical assessor checklists and the level of detail necessary in such checklists. Some committee members expressed the opinion that it is necessary to develop or adopt a uniform checklist for all assessors while other committee members cautioned that assessor checklists should include only a minimum number of questions in order to minimize paperwork. In response to questions of whether the committee will pursue method-specific checklists, a contributor suggested that assessors do not want a method checklist so much as a synopsis of critical performance criteria. It was suggested that such critical performance criteria could be included in assessor training courses for each of the different technical disciplines.

**TECHNICAL ASSESSOR TRAINING**

The committee then turned its attention to discussion of technical training for NELAC assessors. It was noted that if critical performance criteria for mandated methods are included in technical training, then

the course materials must be current as to the version, revision, or effective date of each method. It was suggested that a compendium of Code of Federal Regulations (CFR) references that point to a mandated method should form the basis for critical performance criteria. It was also suggested that the customized checklist used by the state of Florida, which has been submitted to Ms. Marlene Moore, could be incorporated into the criteria.

In addition to the previously proposed Appendix A, there was some discussion of a proposed Appendix B to the NELAC On-site Assessment Standard which would constitute training objectives and include specific critical performance criteria for methods. It was suggested that before such an appendix is developed the committee should at least prepare a one-paragraph summary of the philosophy for the appendix. The committee was referred to the mission statement on technical training course for assessors that they presented to the Conference at NELAC V. After reviewing the mission statement, it was decided that the language of the mission statement could be used as a starting point for the one-paragraph summary. Ms. Rosanna Buhl volunteered to draft the language and distribute it for committee review and comment.

## **POSITION PAPER ON LABORATORY ASSESSMENTS**

Ms. Buhl presented a position paper on the level of detail necessary in an on-site assessment. At issue is whether assessors should review every test within a laboratory's scope of accreditation or only representative tests, as suggested in the proposed changes to the Standard. The position paper generated extensive committee discussion. The committee was split between recommending that an assessor interview every analyst in a laboratory and recommending that an assessor interview only representative analysts. Some members of the committee suggested that it would be impossible to interview every analyst in a large laboratory. They noted that it is the responsibility of laboratory management to assure that analysts are trained and competent to perform their duties. Employee turnover is also an issue. The only way to ensure that new analysts will be trained and competent to perform their duties is to assure that management has the necessary quality systems in place. Other committee members suggested that the Standard should be written to the ideal and not necessarily to what can always be accomplished in a large laboratory. It was suggested that the ideal would be to talk to every analyst. It was also noted that even when different analysts follow the same procedure there can be discrepancies between the resulting data. It was suggested that the assessment should verify both data validity and comparability.

After agreeing that the way to verify that quality systems are in place is to interview an analyst, the committee drew a distinction between the position of bench analyst and other analyst positions such as team leader or data reviewer. It was suggested that if a bench analyst is confident and comfortable answering methods questions, then the laboratory must have the appropriate systems in place. After considerable discussion, it was agreed that an assessor must interview a sufficient number of analysts to be comfortable that the Standard Operating Procedures (SOPs) and methods outlined in the laboratory's Quality Systems manual are effective and implemented at the bench level, and that the systems are in place to ensure that the process is ongoing. It was noted that the process is somewhat subjective and that it is the assessor's responsibility to feel comfortable with the assessment.

There was some discussion of whether the position paper represents the opinion of the entire NELAC On-site Assessment Committee or only one sector of the committee. It was suggested that the position paper represents the opinion of a population who would actually be implementing the NELAC Standards at the state level and for whom the issue could be a potential roadblock to acceptance of NELAC. A voting member expressed the opinion that any position paper presented by the On-site Assessment Committee to the Conference should represent the opinion of the committee as a whole. Ms. Buhl suggested wording changes that would make the position paper acceptable to the committee and indicated that she would distribute these changes for committee review and comment.

## **CONCLUSION**

The allotted time for the teleconference having expired, the meeting was adjourned at 2:30 p.m. EDT.

**ACTION ITEMS  
ON-SITE ASSESSMENT COMMITTEE MEETING  
JUNE 7, 2000**

<b>Item No.</b>	<b>Action</b>	<b>Responsible Member</b>	<b>Date to be Completed</b>
1.	Committee to develop a teleconference schedule extending beyond June 21, 2000.	All	
2.	Committee to develop draft language summarizing committee's philosophy behind the development of "Appendix B" constituting training objectives and critical performance criteria for methods.	R. Buhl	
3.	Committee to wordsmith on-site assessment position paper.	R. Buhl	

**PARTICIPANTS  
ON-SITE ASSESSMENT COMMITTEE MEETING  
JUNE 7, 2000**

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